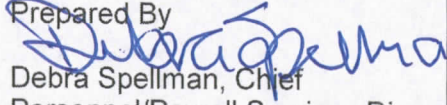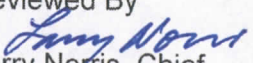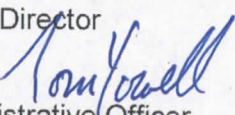| Fiscal Year 2016-17	Business Unit 0840	Department State Controller's Office		Priority No.
Budget Request Name 0840-033-BCP-BR-2016-MR	Program 0500300–PERSONNEL PAYROLL SERVICES 9900100-INFORMATION SYSTEMS		Subprogram	

Budget Request Description
Other Post-Employment Benefit (OPEB) Workload Automation

Budget Request Summary

The State Controller's Office (SCO) requests $883,000 ($503,000 General Fund [GF]; $380,000 Central Service Cost Recovery Fund [CSCRF]) in 2016-17 for 8.0 positions and $573,000 ($327,000 GF; $246,000 CSCRF) in 2017-18 for 5.0 positions to automate the deduction, remittance and reporting for Other Post-Employment Benefit (OPEB) prefunding.

Requires Legislation	Code Section(s) to be Added/Amended/Repealed
☐ Yes ☒ No	

Does this BCP contain information technology (IT) components? ☒ Yes ☐ No	Department CIO	Date
If yes, departmental Chief Information Officer must sign.	Todd Boltjes, Chief Information Systems Division	4-13-16

For IT requests, specify the date a Special Project Report (SPR) or Feasibility Study Report (FSR) was approved by the Department of Technology, or previously by the Department of Finance.

☐ FSR   ☐ SPR   Project No.   Date:

If proposal affects another department, does other department concur with proposal?   ☐ Yes   ☐ No
Attach comments of affected department, signed and dated by the department director or designee.
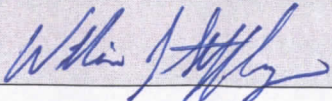
Prepared By	Date	Reviewed By	Date
Debra Spellman, Chief Personnel/Payroll Services Div.	4/13/16	Larry Norris, Chief Admin and Disb. Division	4/13/16
Department Director Tom Yowell Chief Administrative Officer	4-13-16	Agency Secretary George Lolas Chief Operating Officer	4/13/16

BCP Fiscal Detail Sheet

BCP Title: Other Post-Employment Benefit (OPEB) Workload Automation

DP Name: 0840-027-BCP-DP-2016-MR

Budget Request Summary

	CY	BY	BY+1	BY+2	BY+3	BY+4
			FY16			
Salaries and Wages						
Earnings - Temporary Help	0	521	356	0	0	0
Total Salaries and Wages	**$0**	**$521**	**$356**	**$0**	**$0**	**$0**
Total Staff Benefits	0	268	182	0	0	0
Total Personal Services	**$0**	**$789**	**$538**	**$0**	**$0**	**$0**
Operating Expenses and Equipment						
5301 - General Expense	0	16	10	0	0	0
5304 - Communications	0	8	5	0	0	0
5322 - Training	0	8	5	0	0	0
5346 - Information Technology	0	62	15	0	0	0
Total Operating Expenses and Equipment	**$0**	**$94**	**$35**	**$0**	**$0**	**$0**
Total Budget Request	**$0**	**$883**	**$573**	**$0**	**$0**	**$0**

Fund Summary

Fund Source - State Operations	CY	BY	BY+1	BY+2	BY+3	BY+4
0001 - General Fund	0	503	327	0	0	0
9740 - Central Service Cost Recovery Fund	0	380	246	0	0	0
Total State Operations Expenditures	**$0**	**$883**	**$573**	**$0**	**$0**	**$0**
Total All Funds	**$0**	**$883**	**$573**	**$0**	**$0**	**$0**

Program Summary

Program Funding	CY	BY	BY+1	BY+2	BY+3	BY+4
0500300 - Personnel/Payroll Services	0	883	573	0	0	0
9900100 - Administration	0	372	372	0	0	0
9900200 - Administration - Distributed	0	-372	-372	0	0	0
Total All Programs	**$0**	**$883**	**$573**	**$0**	**$0**	**$0**

Personal Services Details

Salaries and Wages	CY	BY	BY+1	BY+2	BY+3	BY+4
Total Salaries and Wages	$0	$521	$356	$0	$0	$0
Staff Benefits						
5150900 - Staff Benefits - Other	0	268	182	0	0	0
Total Staff Benefits	$0	$268	$182	$0	$0	$0
Total Personal Services	$0	$789	$538	$0	$0	$0

Budget Change Proposal - Cover Sheet
DF-46 (REV 08/15)

A.   Budget Request Summary

The State Controller's Office (SCO) requests $883,000 ($503,000 General Fund [GF]; $380,000 Central Service Cost Recovery Fund [CSCRF]) in 2016-17 for 8.0 positions and $573,000 ($327,000 GF; $246,000 CSCRF) in 2017-18 for 5.0 positions to automate the deduction, remittance and reporting for Other Post-Employment Benefit (OPEB) prefunding.

B.   Background/History

Signed on December 28, 2006 Executive Order S-25-06 created the Public Employee Post-Employment Benefits Commission (Commission). The Commission consisted of twelve members tasked with delivering a report to the Governor and Legislature on post-employment benefits. During the first year of the Commission, it was determined that pension and health care components of compensation are critical to both active and retired public employees and the way to ensure that government promises are kept is to prefund those benefits. The Commission developed recommendations meant to facilitate compliance with new reporting standards for OPEB benefits and ensure the fiscal integrity of California's pension systems.

In January of 2008 the Commission delivered their final report to the Governor and Legislature. The report:

- Identified the amount and extent of unfunded liabilities for other post-employment benefits;
- Compared and evaluated the advantages and disadvantages of various approaches for addressing unfunded post-employment benefits;
- Considered the advantages to the Sate from other post-employment benefits; and
- Proposed a plan or plans for addressing unfunded post-employment benefits.

Listed below are some of the key points from the Commission's report:

➢ Identify and Prefund Financial Obligations

- Public agencies providing OPEB benefits should adopt prefunding as their policy.
- Each public employer shall identify its OPEB liability, adopt a prefunding plan and make it public.
- The State of California shall establish prefunding as both policy and budget priority. Develop and make public a prefunding plan and begin prefunding its OPEB liabilities.

➢ Increase Transparency and Accountability

- Legislation should be enacted directing the State Controller's Office to develop a simple and inexpensive procedure to regularly collect and report OPEB data from California public agencies.
- The State Controller's Office should publish the annual report of public pensions, which is required by current law, within 12 months of the receipt of data but in no case longer than 19 months after the end of the fiscal year.

➢ Improve Plan Design and Communications with Employees

- An employer contributing to retiree health care should make that contribution proportionate to the number of years of employment and should reward longer careers. This should be implemented through collective bargaining and should be applied to newly hired employees.

As a result of these findings, OPEB was first adopted by Bargaining Units (BUs) in 2009-10 as a way to prefund post-employment benefits. The first BU to adopt OPEB prefunding was BU05 (7,159 employees) and the first deduction went into effect 01/01/2010. By 2012, BU12 (12,904 employees) and BU16 (1,747 employees) followed with prefunding originally set to become effective 07/01/2012 but postponed until 07/01/2013.

The Personnel Payroll Services Division (PPSD) currently creates OPEB deductions outside of the payroll system for bargaining units 5, 12 and 16. This process consists of using a monthly, point in time program, which involves creating deduction transactions and then deducting approved amounts from eligible employee payments during the master payroll process. Those amounts plus approved corresponding employer share amounts, if applicable, are then transferred to specific accounts in the California Public Employees' Retirement

System (CalPERS). Unfortunately, the current program being utilized to create OPEB deductions runs two days prior to master payroll. Departments are able to make changes to employement history records after OPEB deductions are created. Therefore, the existing point-in-time program does not allow for automated system calculations related to retroactive adjustments in pay. Fortunately, the BUs currently being processed are subject to deductions calculated off of base pay, are small in population, and have little movement by their employees. Because of these static factors, PPSD has been able to process the correct deductions, with some manual corrections along the way.

Because of current labor negotiations, BU06 will begin adopting the OPEB program as early as July 1, 2016. Tentative agreements for BU09 and BU10 will become effective July 1, 2017. PPSD cannot accommodate the introduction of any new BUs to the current point-in-time program that creates deductions outside of the normal payroll process, and does not have sufficient resources to develop and implement OPEB as a real time payroll deduction. As the population of employees subject to deductions grow, the risk of applying incorrect deductions may also increase. With a larger population, and more complex criteria, there is a greater chance that employment history transactions affecting pay may occur between when the program is run and the end of the pay period. Furthermore, BUs 06, 09 and 10 utilize pensionable pay as the basis for OPEB deductions. Pensionable pay consists of base pay and any Special pay types an employee is due payment for. Special pays, if entered in employment history, are included in the master payroll run but when those pays are not locked into employment history they are issued separately as part of the daily pay cycle process. Continuing the current process would require staff to manually review the monthly deductions for accuracy and calculate any adjustments.

Resource History
(Dollars in thousands)

Program Budget	2010-11	2011-12	2012-13	2013-14	2014-15
Authorized Expenditures	$33,000	$59,000	$59,000	$111,000	$111,000
Actual Expenditures	$33,000	$59,000	$59,000	$111,000	$111,000
Revenues	N/A	N/A	N/A	N/A	N/A
Authorized Positions[1]	0.3	0.3	0.5	1.0	1.0
Filled Positions	0.3	0.3	0.5	1.0	1.0
Vacancies	0.0	0.0	0.0	0.0	0.0

[1]Existing positions were used to analyze and implement the OPEB workload related to BU05 in 2010-11 and 2011-12. In 2012-13, preparation to bring BU12 and BU16 on to the OPEB program began, with workload beginning July 1, 2013. The existing resources continue to support the maintenance of the current workload outside of payroll for three BU's deductions.

Workload History

Workload Measure	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16
Monthly deduction transactions created outside of payroll, remittances & reporting (by # of employees)	7,159	7,159	7,159	21,810	21,810	21,810

C.   State Level Considerations

The SCO is responsible for issuing pay to employees of the state civil service, CSU and the Judicial Council utilizing the SCO's Uniform State Payroll System (USPS) and maintaining their employment history. There are

currently over 150 departments and 24 campuses in the State of California. The state workforce is comprised of approximately 284,000 employees, represented by 21 state civil service BUs and 13 CSU BUs. Employees are located throughout California and in other states, and range from elected officials, managers and supervisors, and higher education faculty, to rank and file workers in various occupations.

The USPS is a decentralized system. Civil Service Departments and CSU Human Resources staff are responsible for entering data into the USPS to accurately generate personnel and payroll records. As a control agency, the SCO has a statewide responsibility to manage the personnel resources of the State, account for salary and wage expenditures, and provide data to the retirement systems necessary for calculation of employee retirement benefits in a fiscally responsible manner. OPEB significantly affects how the SCO carries out this core responsibility and requires the SCO to make programming changes to the USPS and related business processes. Additionally, as the mandated reporter for the State of California, the SCO is responsible for generating reports to CalPERS, the California Department of Human Resources (CalHR), and the Unions on OPEB activity. This workload is crucial to the State of California to ensure OPEB compliance and accuracy in mandated reporting.

D.   Justification

Since the beginning of the program in 2010, PPSD has processed OPEB deductions as a point in time deduction outside of the payroll system for three BUs. This workload has been accomplished with the equivalent of one full-time position (0.5 Staff Services Manager I, 0.4 Associate Governmental Program Analysts and 0.1 Senior Information Systems Analyst). This staff is responsible for other Employment History and Data Management workloads - OPEB is not their primary duty. In order to establish the OPEB program, staff initially:

- Implemented a process and corresponding procedures to perform OPEB calculations outside of payroll.
- Developed business requirements to have a specialized employment history report produced to establish OPEB deductions.
- Developed processes for adjustments due to retroactivity.
- Developed processes to report OPEB deduction amounts for CalPERS accounts.
- Established a monthly transfer memo process to the SCO's Division of Accounting and Reporting (DAR) to remit OPEB monies to the appropriate CalPERS accounts.

Currently, the staff is responsible for:

- System, business process and contract analysis;
- Documentation of required program changes;
- Writing and modifying business requirements for reports;
- Preparing monthly transfer memos for submittal to DAR for disbursements of the deductions withheld;
- Analyzing and fixing errors; and
- Review of retroactivity to determine corrections to withheld amounts.

While the SCO could continue to utilize the monthly point-in-time program to create deduction transactions, the OPEB program continuously changes as new components and BUs are added and has no consistent criteria on which to build and maintain an effective and efficient point in time program for creating deductions outside of the normal payroll process. Changes to the current program have resulted from agreements between CalHR, California Association of Highway Patrolmen (CAHP), CalPERS, and the SCO. These include eligible classifications, employee and employer contribution amounts, funding sources for employer contributions, funds to which the contributions are deposited and the procedures with which the contributions are processed.

In addition to the changing aspects of OPEB, there is also growth in the number of deductions. The original three BUs (BU05, 12 and 16) were comprised of 21,810 employees. Recently BU06 brought a contract forward for ratification with OPEB provisions effective July 1, 2016 for approximately 30,000 employees. Effective July 1, 2017 it is estimated that the number of employees with OPEB deductions will grow by another 12,936 (BU09 and 10), bringing the total employee population to 64,746. As more BUs adopt OPEB, larger numbers of the state employee population will require deductions to be withheld. As the program continues to change and

expand, automation of the process is necessary to allow for the flexibility needed to accommodate future program changes and new BUs moving into the program.

The two-year limited-term funding requested through this BCP will allow the SCO to automate OPEB deductions as a part of the normal payroll process. With the requested resources the SCO will:

- Create a project plan including a schedule of activities (requirements, design, code and implementation tasks) and associated timelines.
- Perform system, business, and contract analysis to determine the impact of OPEB on the USPS for specific bargaining units.
- Determine business requirements to automate OPEB rules, including the identification of data elements, standard and ad-hoc reporting criteria and a migration strategy for BUs covered by the existing processes occurring outside of payroll.
- Complete coding to modify or create new application programs to automate results of the business analyses.
- Develop test plans, test strategies and test cases for staff to execute.
- Develop an implementation plan.
- Perform table updates and maintenance, and develop reports for reporting and ad-hoc usage.
- Provide communication to departments and control agencies on automated OPEB program changes.

A portion of the current workload will remain after the OPEB automation is completed. This will involve the processing of any retroactive OPEB workload for those deductions that occurred prior to automation. Subsequent efforts will be required to analyze and identify a solution to synchronize the OPEB history from the point-in-time process with deductions generated through the automated payroll process. This will allow all OPEB deduction information to be accessible in one central location.

Additionally, the one-year limited-term funding will allow the SCO to address the workload associated with processing BU06 OPEB deductions effective July 1, 2016 by developing an interim point-in-time program. With the increased employee population and more complex deduction criteria, additional measures must be taken to ensure accurate deductions are withheld. The additional complexity is derived from the requirement to apply deductions to all pensionable compensation (base pay and any applicable special pays) for health benefits eligible employees and process respective employer contributions. In March 2016, BU06 had 50,000 payments issued outside of the master payroll process. These payments would not be captured in the point-in-time program, but by a look back program to 1) determine if a deduction should be applied to the payment and if so 2) determine what the appropriate additional deduction is, ensuring all pay in a pay period is considered accurately. Of these estimated 50,000 monthly payments, non-pensionable payments can be excluded from the review and analysis process, which should reduce the total number of payments for manual review. Pensionable payments that issue outside of master payroll would require additional programs be developed to capture those payments, then create reports to verify and validate whether a deduction needs to be applied. The requested resources would develop and maintain more point-in-time programs to apply the more basic adjustments (flat rate payments), as well as manually review and calculate adjustments of a more complex nature (percentage based payments).

While the SCO is currently processing OPEB deductions, these deductions have never had the level of complexity and criteria of those anticipated with BU06. The following table utilizes the information available to PPSD regarding BU06 current payments and makes several assumptions in order to estimate the required one-year need to support BU06 deductions prior to automation.

2016-17 BU 06 OPEB Deduction Workload					
	Monthly Volume	Monthly Time to Process (in hours)	Annual Time to Process (in hours)	Total Need	Total Request
Payments Outside of Master Pay	50,000				
Pay Types/Differentials	20				
Average Payments per Pay Type	2,500				
Pensionable Pay Types	9				
Estimated Pensionable Payments	22,500				
% Based Pay[1]	7,500	625	7,500	4.2	2.0
Flat Rate Pay[2]	7,500	200	2,400	1.4	1.0
Shift Based Pay[2]	7,500				
Total		825	9,900	5.6	3.0

[1] Assumes that it will take 5 min to manually review a % based pay; however, PPSD will begin to develop processes to filter and analyze data to allow for efficiencies. It is believed that with these tools, a lesser amount of resources may be required to perform manual review and calculations.

[2] Assumes that flat and shift based pay type deduction adjustments can be managed through the current point-in-time process. Currently, less than 1.0 equivalent of staff time is spent on a once monthly process to calculate OPEB deductions for existing BUs. It is assumed that this point-in-time process will occur several times throughout the month to account for the numerous pay types that will occur in daily pay cycles, and will require ongoing analysis and review to ensure deduction accuracy.

Since this is an entirely new workload, the SCO is utilizing limited data to provide the best estimate of required resources. The actual processes and workload needs may change once deductions begin for BU06. The SCO will utilize the requested resources to ensure the accuracy of both employee and employer shares of the OPEB deductions.

E.   Outcomes and Accountability

With the requested resources, the SCO will be able to support OPEB automation, and implement all required changes to the USPS and associated business processes to comply with the mandated requirements of collective bargaining. Once this automation is finalized, the USPS will have the capability to accommodate OPEB deductions for any future BUs. Additionally, the SCO will have the necessary support to continue the manual workload related to retroactivity and pursue a solution to synchronize the historical data with the newly automated system data.

Projected Outcomes

Workload Measure	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21
Monthly deduction transactions created outside of payroll, remittances and reporting	21,810	51,810	51,810	-	-	-
Monthly automated deductions, remittances and reporting	-	-	12,936	64,746	64,746	64,746
Manual retroactivity	21,810	51,810	51,810	51,810	TBD	TBD

F.   Analysis of All Feasible Alternatives

Alternative 1: Provide the SCO with $883,000 ($503,000 General Fund [GF]; $380,000 Central Service Cost Recovery Fund [CSCRF]) in 2016-17 for 8.0 positions and $573,000 ($327,000 GF; $246,000 CSCRF) in 2017-18 for 5.0 positions to automate the deduction, remittance and reporting for Other Post-Employment Benefit (OPEB) prefunding.

Pros:
- The SCO will be able to continue to implement the provisions and reporting requirements of OPEB

- Helps the State of California prefund retiree benefits and avoid excess strain on post-employment pensions
- The SCO will be able to provide customer support and system maintenance to all OPEB stakeholders
- May reduce the likelihood of over and under withholding OPEB deductions resulting from the current point in time deduction process due to failure to implement automation of OPEB

Cons:
- Requires additional staffing and funding.

Alternative 2: Do Nothing

Pros:
- No additional staffing or funding is required

Cons:
- Will cause the SCO to miss mandated timeframes for implementing the provisions and reporting requirements of OPEB
- Leaves the State of California vulnerable to incurring additional post-employment benefit costs.
- Increases the likelihood of over and under withholding OPEB deductions resulting from the current point in time deduction process due to failure to implement automation
- Result in retroactivity charges due to delay in implementing OPEB

G. Implementation Plan

TIME FRAME	Outcome
June 2016 – June 2018	Analyze, design, develop, test, implement, communicate and report for workload related to automating OPEB. Provide ongoing support for deduction changes and problem resolution.

H. Supplemental Information
In addition to the SCO standard OE&E complement, additional funding for Data Processing is included within this request.

Data Processing - $38,000 is requested for desktop PCs, monitors, and software/licenses.

I. Recommendation
Approve Alternative 1 and provide the SCO with $883,000 ($503,000 General Fund [GF]; $380,000 Central Service Cost Recovery Fund [CSCRF]) in 2016-17 for 8.0 positions and $573,000 ($327,000 GF; $246,000 CSCRF) in 2017-18 for 5.0 positions to automate the deduction, remittance and reporting for Other Post-Employment Benefit (OPEB) prefunding.

Personnel and Payroll Services Division (PPSD) Workload Description	BY 2016-17				BY+1 2017-18			
	New Annual Increased Workload/Task	Annual Hours per Task	Total Increased Hours	Number of Positions	New Annual Increased Workload/Task	Annual Hours per Task	Total Increased Hours	Number of Positions
Classification: Associate Governmental Program Analyst (2 year LT)								
Major responsibility: Under the direction of the Staff Services Manager I or II, the incumbent is responsible for performing a variety of projects and analytical support activities associated with the statewide employment history and payroll systems. Assignments include both short-range and long-range responsibilities generally falling into the areas of impact analysis, business process analysis, assessments of user needs, the coordination of monthly and ongoing payroll processes, report generation, consultation, federal and state regulation analysis, problem resolution and creation of new capabilities. Of critical importance is the incumbents responsibilities to implement and maintain the Other Post-Employment Benefits (OPEB) program.								
> Assess system changes and solutions to enable SCO to successfully adhere to the OPEB deduction and reporting requirements. This includes programming changes to the payroll system as well as the MIRS (Management Information Retrieval System) and SWIRS (Statewide Information Retrieval System) reporting systems.	12	50	600	0.3	12	50	600	0.3
> Develop business requirements; submit system service requests; develop test plans; perform user acceptance testing; develop implementation plans; develop procedures; update manuals; develop and update end user training materials; provide end user support and prepare communications to various stakeholder groups.	12	40	480	0.3	12	40	480	0.3
> Develop, test and validate the requirements to meet the OPEB deduction and reporting requirements as well as ongoing ad hoc reports for SCO; CalHR; CalPERS and miscellaneous requestors. This includes delivery of data to requesting entity.	12	40	480	0.3	12	40	480	0.3
> Ongoing analysis of the state regulations and bargaining to determine the technical and procedural impact of OPEB as well as reporting requirements.	18	100	1800	1.0	18	100	1800	1.0
> Work directly with subject matter experts and control agencies to plan, organize, and develop an implementation work plan.	24	10	240	0.1	24	10	240	0.1
> Represent the SCO on focus groups, task forces, internal meetings.	48	2	72	0.0	48	2	72	0.0
Workload assumption: OPEB deductions and reporting are mandatory per bargaining, therefore system changes and new reports are necessary for implementation in order for the State to be in compliance.								
ASSOCIATE GOVERNMENTAL PROGRAM ANALYST (2 year LT)	**126**	**242**	**3,672**	**2.0**	**126**	**242**	**3,672**	**2.0**
Classification: Associate Governmental Program Analyst (1 year LT)								
Major responsibility: Under the direction of the Staff Services Manager I or II, the incumbent is responsible for performing review and analysis of the Flat Rate and Shift Based pensionable pay types/differentials in the OPEB program.								
> Analyze, develop and implement point-in-time programs to capture payments outside of master payroll which will verify and validate need for deductions on flat rate and shift based pay. The programs may require monthly review and updating. Additionally, staff will be responsible for testing and validation of resulting deduction adjustments.	36	67	2,412	1.4			-	0.0
Workload assumption: Assumes that point-in-time programs will need to be developed, implemented and reviewed approximately 3 times a month.								
ASSOCIATE GOVERNMENTAL PROGRAM ANALYST (1 year LT)	**36**	**67**	**2,412**	**1.4**	**-**	**0**	**-**	**0.0**
Classification: Senior Payroll Specialist (1 year LT)								
Major responsibility: Under the direction of the Staff Services Manager I or II, the incumbent is responsible for performing review and analysis of the % Based pensionable pay type/differential in the OPEB program.								

Personnel and Payroll Services Division (PPSD) Workload Description	BY 2016-17				BY+1 2017-18			
	New Annual Increased Workload/Task	Annual Hours per Task	Total Increased Hours	Number of Positions	New Annual Increased Workload/Task	Annual Hours per Task	Total Increased Hours	Number of Positions
> Review of pay types occurring outside of the master payroll and all retroactivity to determine corrections to withheld amount, ensuring accurate deductions are transferred to the state and employees are not overcharged. Analyzing and manually fixing errors.	90,000	0.04	3,750	2.1			-	0.0
Workload assumption: Assumes that 7,500 payments will require review monthly (7,500 x 12 = 90,000). With preparation and developed processes, it is assumed some payments may not require any analysis, while others may require more time, resulting in an average of 2.5 minutes per a payment.								
SENIOR PAYROLL SPECIALIST (1 year LT)	90,000	0	3,750	2.1	-	0	-	0.0
TOTAL: PPSD	90,162	309	9,834	5.5	126	242	3,672	2.0
TOTAL Requested				5.0				2.0

Information Systems Division (ISD) Workload Description	New Annual Increased Workload/ Task	Annual Hours per Task	Total Increased Hours	Number of Positions
	BY 2016-17 through BY+1 2017-18			
Major responsibility: Lead system development lifecycle activities in performing maintenance and operations work on mainframe-based Payroll and Personnel application systems. Activities include developing technical specifications, design, coding, and testing to implement application changes related to OPEB regulations. *> Act as project and/or technical leader within a multi-disciplined project team or work as technical specialist independently to analyze, plan, prepare, coordinate and execute the most complex technical activities and programming tasks required to automate to OPEB regulations.*	1	350	350	0.2
> Design, develop and implement the most complex program changes to support business rules incorporating SCO programming and application development standards.	1	850	850	0.5
>Develop test plans, execute unit, system and regression testing. Support User Acceptance Test activities.	1	400	400	0.2
> Perform quality reviews and inspections at critical stages in the system development lifecycle.	2	40	80	-
> Communicate effectively and develop productive relationships with co-workers, management, and internal and external business partners to foster teamwork and to ensure that work progresses.	52	3	156	0.1
> Prepare reports and presentations for executive management.	12	2	24	-
Workload assumption: Based on historical experience with application changes of similar size.				
TOTAL Senior Programmer Analyst (Specialist)	**69**	**1,645**	**1,860**	**1.0**
Classification: Staff Programmer Analyst (Specialist) **Major responsibility:** Perform system development lifecycle activities. Activities include assisting the Senior Programmer Analyst in the development of the technical specifications, design, coding, and testing to implement application changes related to OPEB regulations. *>Work as technical specialist to analyze, plan, prepare, coordinate and execute complex technical activities and programming tasks to automate OPEB regulations.*	1	200	200	0.1
>Design, develop and implement complex program changes to support business rules incorporating SCO programming and application development standards.	1	900	900	0.5
>Execute unit, system and regression testing. Support User Acceptance Test activities.	1	500	500	0.3
> Communicate effectively and develop productive relationships with co-workers, management, and internal and external business partners to foster teamwork and to ensure that work progresses.	52	3	156	0.1
>Prepare reports and presentations for project lead.	52	1	52	-
Workload assumption: Based on historical experience with application changes of similar size.				
TOTAL Staff Programmer Analyst (Specialist)	**107**	**1,604**	**1,808**	**1.0**
Classification: Staff Information Systems Analyst (Specialist) **Major responsibility:** The Staff Information Systems Analyst will perform a variety of business analysis activities and serve as an advanced technical specialist in the development and implementation of the automation of OPEB regulations. *> Lead business process analysis, business requirements' elicitation and documentation, analysis, and verification activities. Decompose high-level business and user requirements into functional requirements; write requirements specifications. Ensure requirements traceability and manage requirements change control activities throughout the project.*	1	800	800	0.5
> Document functional specifications for OPEB processes, design documentation for changes to the SCO mainframe systems and transition requirements for implementation of the change.	1	600	600	0.3
> Work with PPSD program staff to support the development of project tasks, schedules and status reports. Meet with project teams on a regular basis. Collaborate with project team in creating and executing implementation plan.	52	4	208	0.1
> Assist SCO business with implementation activities.	1	100	200	0.1
Workload assumption: Based on historical experience with other implementations of regulations in the SCO mainframe systems.				
TOTAL Staff Information Systems Analyst (Specialist)	**55**	**1,504**	**1,808**	**1.0**
TOTAL: ISD	**231**	**4,753**	**5,476**	**3.0**